

Quality Review Sheet



This form is used to Quality Review the completed tax return based on the Intake/Interview Sheet, the documents provided for the return preparation, and a conversation with the taxpayer.

- Involve the taxpayer in the Quality Review process.
- Complete this form prior to obtaining the taxpayer's signature on required tax forms.
- Compare the completed return with the Intake/Interview Sheet and all supporting documents.

Quality Reviews complete the Quality Process and help ensure an accurate return.

Verifying the Return *Check each item only when you verify that the review step is complete.*

- | | | |
|-----|--|--|
| 1. | <input type="checkbox"/> Yes <input type="checkbox"/> No | A completed Intake/Interview Sheet was used to prepare this tax return. |
| 2. | <input type="checkbox"/> Yes <input type="checkbox"/> No | Name(s) and SSNs/ITINs for taxpayer(s) match the supporting documents. |
| 3. | <input type="checkbox"/> Yes <input type="checkbox"/> No | The taxpayer(s) address and Date of Birth match the Intake/Interview Sheet and have been confirmed with the taxpayer. |
| 4. | <input type="checkbox"/> Yes <input type="checkbox"/> No | Filing status was correctly determined and is notated on the Intake/Interview Sheet. |
| 5. | <input type="checkbox"/> Yes <input type="checkbox"/> No | Dependent information is correctly shown including names, SSNs/ITINs, and DOBs. |
| 6. | <input type="checkbox"/> Yes <input type="checkbox"/> No | All income indicated on the Intake/Interview Sheet and W-2s/1099s is shown. |
| 7. | <input type="checkbox"/> Yes <input type="checkbox"/> No | Any Adjustments to Income are correctly reported. |
| 8. | <input type="checkbox"/> Yes <input type="checkbox"/> No | The completed return reflects the correct standard deduction unless itemized deductions were used. If itemized deductions were used, the Schedule A has been completed accurately based on supporting documents. |
| 9. | <input type="checkbox"/> Yes <input type="checkbox"/> No | The non-refundable credits have been correctly reported. |
| 10. | <input type="checkbox"/> Yes <input type="checkbox"/> No | All payments from W-2s and F1099's and estimated tax payments are correct. |
| 11. | <input type="checkbox"/> Yes <input type="checkbox"/> No | The refundable credits are correctly reported including the EIC determination based on the information provided. |
| 12. | <input type="checkbox"/> Yes <input type="checkbox"/> No | If direct deposit or debit was elected, information on the return matches the taxpayer's checking/saving account and routing information. |

Finishing the Return *Check the appropriate box once you have confirmed the steps have been taken.*

- E-File:** Verify correct **DCN and SIDN** is printed on Form 8879. Obtain taxpayer signature and provide a copy of the return for their files. Retain original signed Form 8879 with the Forms W-2's and 1099's attached.
- Paper:** Verify the correct **SIDN** is printed on the return. Attach Forms W-2's and 1099's to the return. Obtain taxpayer signature and provide the signed return, a copy of the return, and the correct processing center mailing address to the taxpayer.
- All taxpayer questions/issues about the completed return have been answered.